

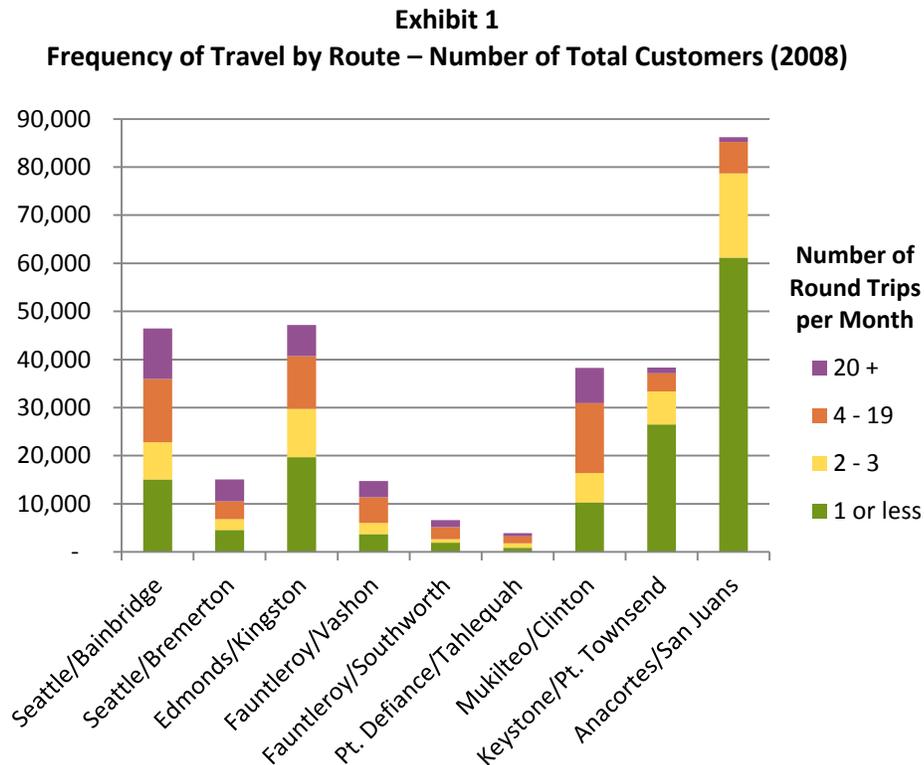
# WSF CUSTOMER AND HOUSEHOLD DEMOGRAPHICS

**DRAFT: October 12, 2011**

## CUSTOMER INFORMATION

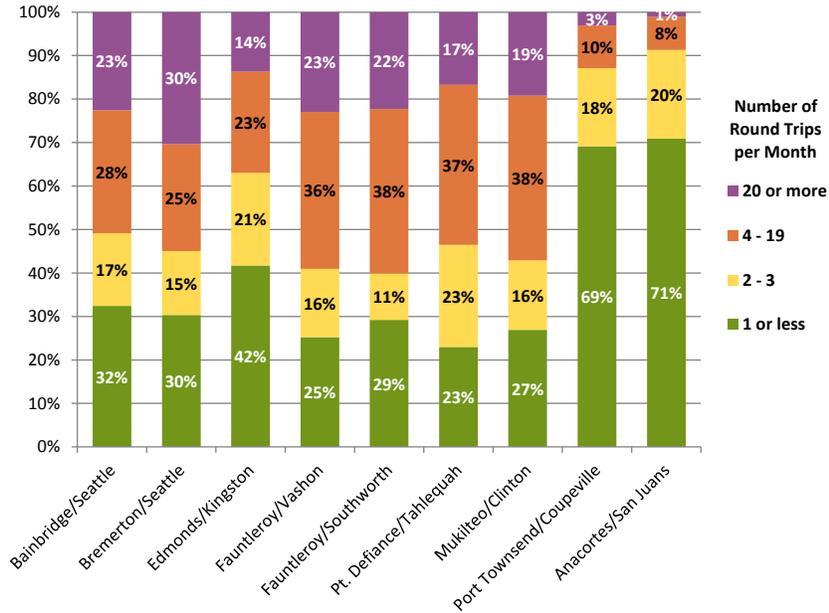
This analysis uses the trip frequency and demographic data in WSTC 2008 winter and summer onboard surveys. There were over 5,400 responses to the winter survey (conducted in March 2008) and over 7,500 responses to the summer survey (conducted in July 2008).

## Frequency of Travel

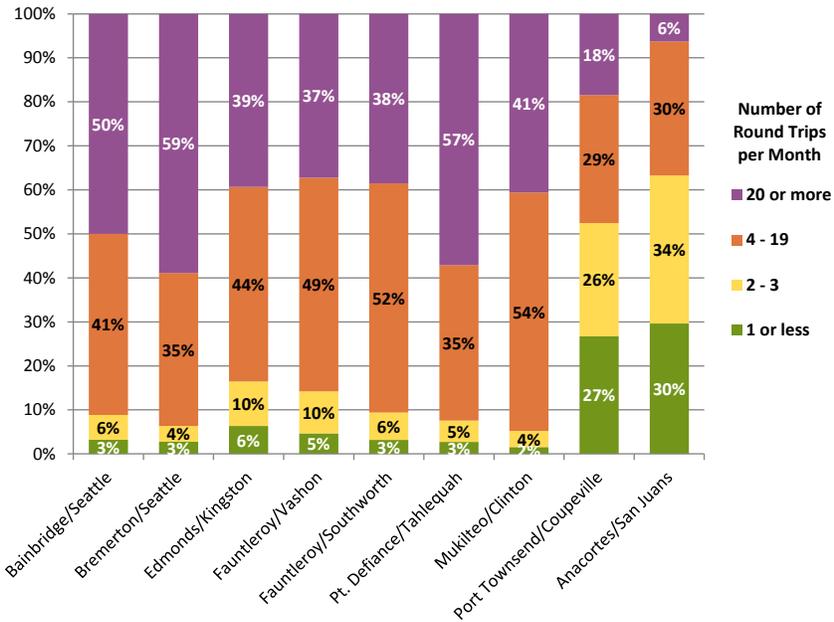


- Even on routes with a higher number of commuters, infrequent riders make up a large proportion of the customer base. On Bainbridge, Approximately 50% of customers take 3 round trips per month or less.

**Exhibit 2**  
**Frequency of Travel by Route – Proportion of Total Customers (2008)**



**Exhibit 3**  
**Frequency of Travel by Route – Proportion of Total Trips (2008)**

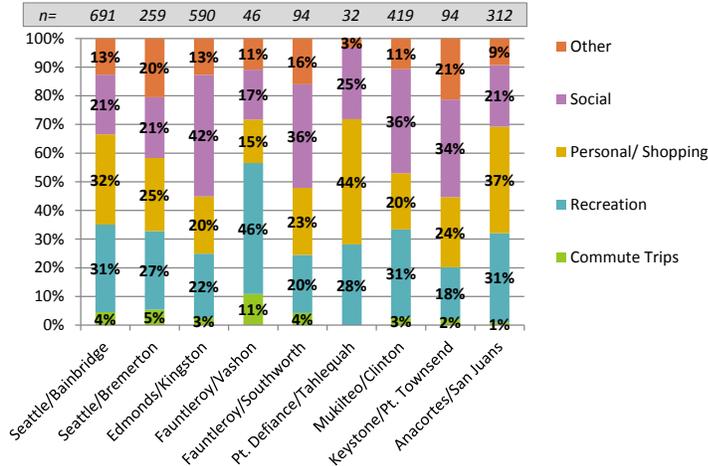


- Although infrequent riders make up a large portion of customers on many routes, they account for a small portion of the trips. On Edmonds-Kingston, for example, infrequent customers account for 63% of the total customers but only 16% of the average monthly trips.

Trip Purpose

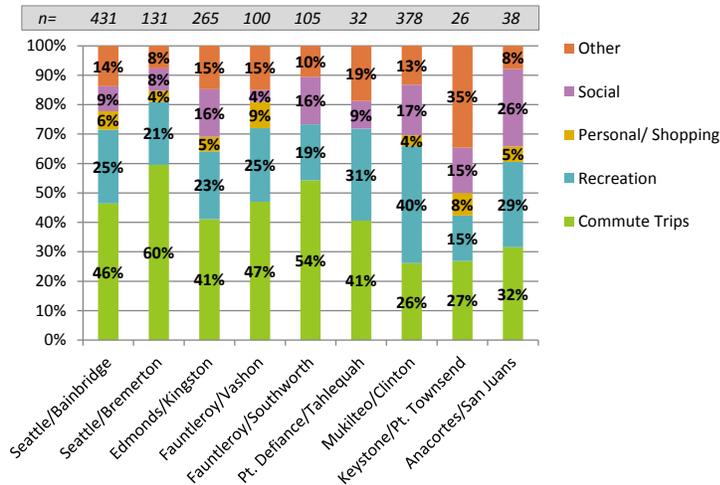
Exhibit 4  
TRIP PURPOSE: Proportion of Customers by Route and Frequency of Travel (2008)

Infrequent Customers (0 – 3 Round Trips per Month)

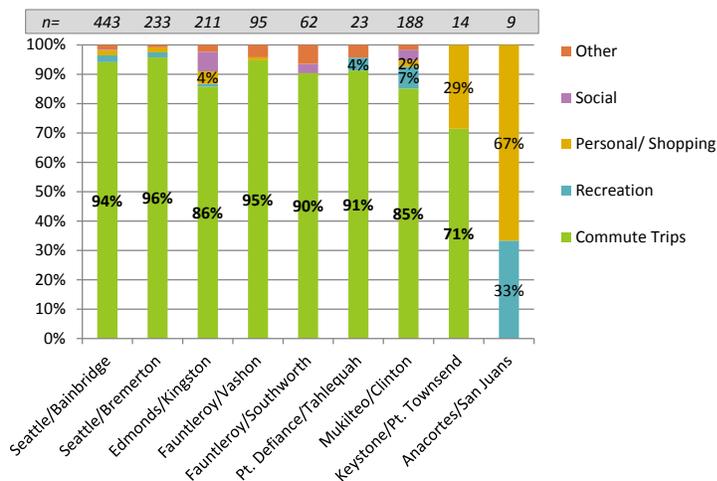


- Of the customers who travel an average of 4 – 19 round trips per month, approximately half cite a commute as their trip purpose. This is less frequent than 5 days per week and might indicate a greater proportion of customers who telecommute or work part time schedules.
- On Port Townsend-Coupeville, and Anacortes-San Juan Islands, a significant portion of customers who travel daily do so for reasons other than work.

Moderately Frequent Customers (4 – 19 Round Trips per Month)



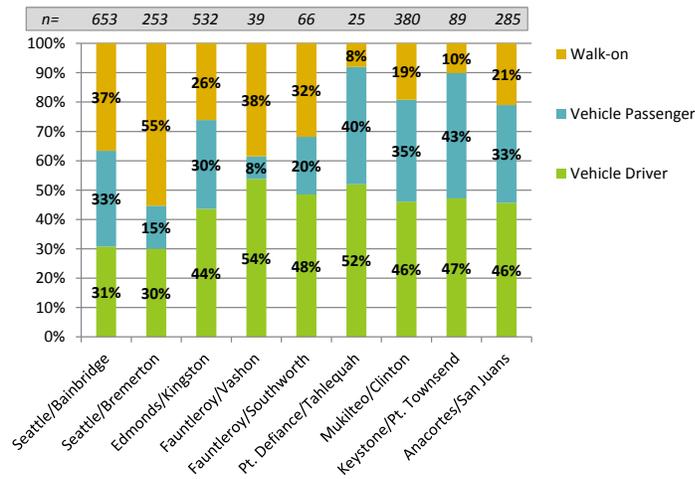
Daily Commuters (20+ Round Trips per Month)



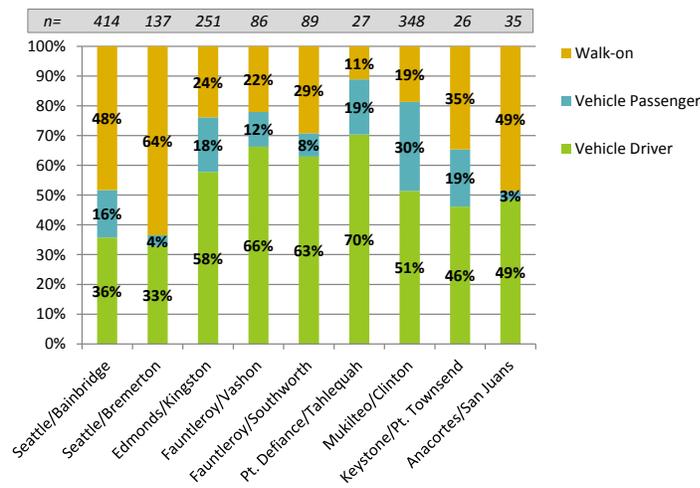
## Mode of Travel

**Exhibit 5**  
**MODE OF TRAVEL: Proportion of Customers by Route and Frequency of Travel (2008)**

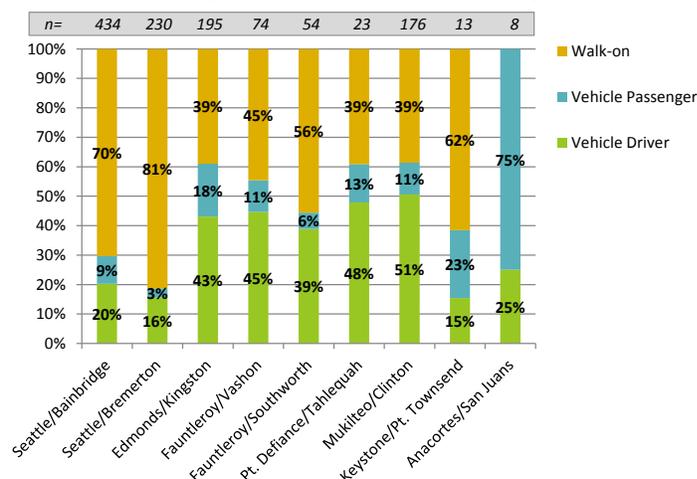
### Infrequent Customers (0 – 3 Round Trips per Month)



### Moderately Frequent Customers (4 – 19 Round Trips per Month)



### Daily Commuters (20+ Round Trips per Month)

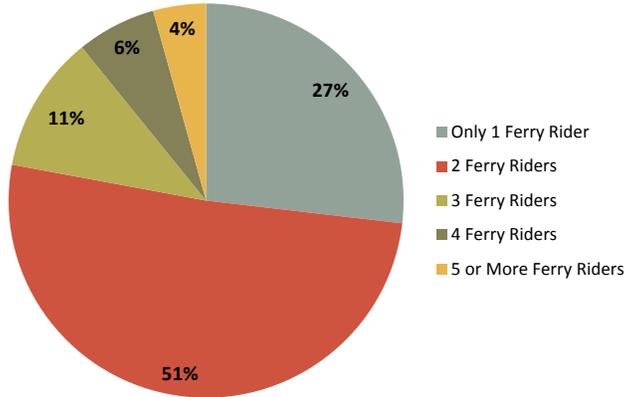


- As frequency of travel increases, there is a greater likelihood that customers will walk on
- Amongst daily commuter customers, Bainbridge, Bremerton, and Port Townsend have the highest proportion of walk-on customers
- Customers who travel an average of 4 – 19 round trips per month are more likely to drive their vehicles on than both infrequent customers and daily commuters.
- The share of daily commuters that walk on is high, even on routes that are typically thought of as more vehicle-centric (i.e. Mukilteo, Pt. Defiance, Southworth, Vashon, and Edmonds)

## FERRY RIDING HOUSEHOLDS

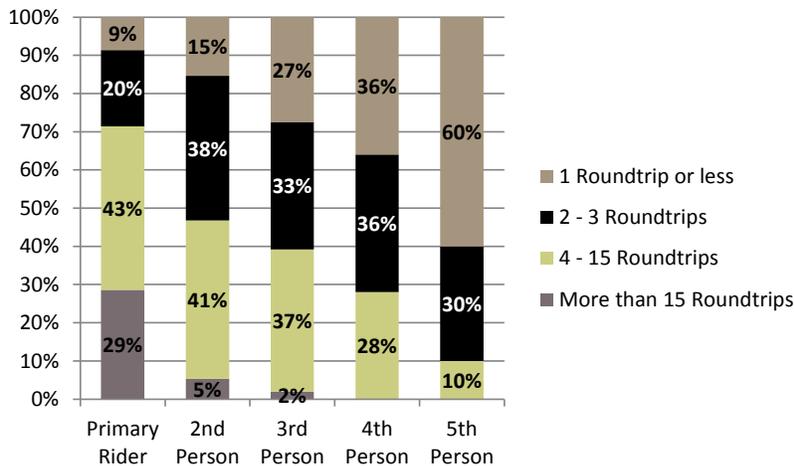
In September 2011, the Commission did a quick poll of a subset of the Ferry Riders Opinion Group (FROG) panel to test possible questions and responses around household use of the ferry system. The following analysis is based on 273 responses to that poll.

**Exhibit 6**  
**Number of Ferry Riders per Household**



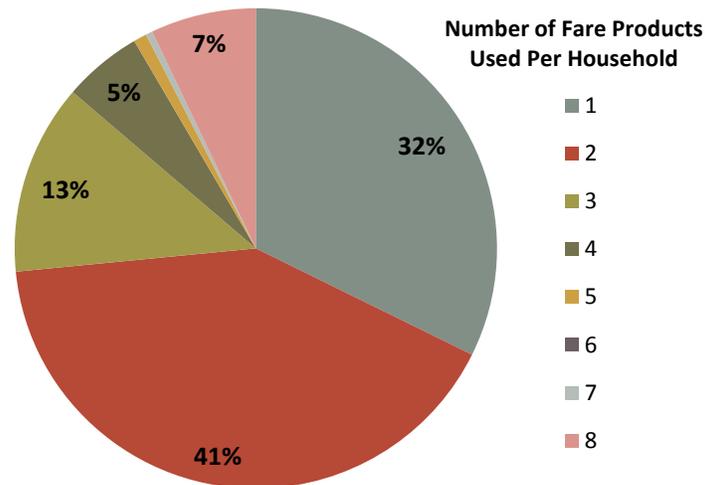
- 27% of respondents said there was only 1 person in the household who rides ferries
- 51% of respondents said there were 2 people in the household who ride ferries
- 22% of respondents said there were 3 or more people in the household who ride ferries

**Exhibit 7**  
**Frequency of Travel by Household Member (Trips per Month)**



- Most households that responded have only one very frequent ferry rider (15 round trips per month or more).
- 5% of the households have 2 very frequent ferry riders; 2% of households have 3 very frequent riders.

**Exhibit 8**  
**Number of Fare Products Used by Household**



- The poll asked about the following 8 fare products: (1) passenger full fare tickets, (2) passenger youth discount tickets, (3) passenger senior discount tickets, (4) passenger multi-ride cards, (5) passenger monthly passes, (6) vehicle full fare tickets, (7) vehicle senior discount tickets, and (8) vehicle multi-ride cards.
- 73% percent of households responding to the poll use one or 2 fare products, with those using two typically citing a passenger and vehicle product.
- 27% percent of households use 3 or more different fare products, with 7% responding that they use eight different fare products in a month.
- When the fare products used are analyzed by the household member who uses them, it shows that the primary riders are more likely to use products that include discounts for frequency of travel (multi-ride cards and passes). 83% of the trips taken by the primary riders used these products.
- The 3<sup>rd</sup> and 4<sup>th</sup> ferry riders in a household are more likely to use passenger fare products, particularly youth passenger tickets.